Sample letter to your IRA provider

To make a qualified charitable distribution (IRA charitable rollover) to Transitions of PA, send a letter like this to your IRA administrator. Call your plan provider first: many have their own form, or a preferred way to receive this request.

[Date]

[Name of IRA provider]
[Address]
[City, State, ZIP]

Re: Request for Qualified Charitable Distribution from Individual Retirement Account

Dear Sir or Madam:

Please accept this letter as my request to make a qualified charitable distribution from my Individual Retirement Account under Sec. 1201 of the Pension Protection Act of 2006 (the PPA) and Sec. 408(d)(8) of the Internal Revenue Code of 1986, and made permanent under the Consolidated Appropriations Act of 2016. My account number is **[account number]**.

Please issue a check in the amount of $_____ payable to Transitions of PA at the following address:

Transitions of PA, PO Box 170, Lewisburg, PA 17837

In your transmittal to Transitions of PA, please state my name and address as the donor of record in connection with this transfer, reference the following gift designation: **[intended use of gift]**, and copy me on your transmittal.

It is my intention to have this transfer qualify during the **[year]** tax year. Therefore, it is imperative that this distribution be postmarked no later than December 31, **[year]**.

Thank you for your prompt attention to and assistance with this matter.

Sincerely,

[Signature of IRA owner]
[Printed name]

Please let us know when you direct the rollover, so we can watch for the check from your IRA administrator.

Development Department
570-523-1134 ×107 · development@transitionsofpa.org · transitionsofpa.org/planned-giving

This document is for educational purposes only and is not professional tax, legal, or accounting advice. Please consult a qualified professional advisor about your own situation.